BEST PRACTICES FOR ILL LENDING AND BORROWING

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Wyoming
STATE LIBRARY

PURPOSE:

- "In the interest of providing quality service, libraries have an obligation to obtain material to meet the informational needs of users when local resources do not meet those needs. Interlibrary loan (ILL), a mechanism for obtaining material, is essential to the vitality of all libraries."

- "…to obtain, upon request of a library user, material not available in the user's local library."

- "…tool that can balance unequal distribution of resources in Wyoming."

(2016) *Interlibrary Loan Code for the United States.* Retrieved from http://www.ala.org/rusa/guidelines/interlibrary

(2017) *WYLD ILL Best Practices.* Retrieved from https://library.wyo.gov/wyld/support/practices/

RESOURCES

- Interlibrary Loan Code for the United States
    - Reference and User Services Association (RUSA)
    - http://www.ala.org/rusa/guidelines/interlibrary

- OCLC Training
    - Live and recorded webinars
    - https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Training

- Wyoming State Library
    - https://library.wyo.gov/wyld/support/vdx/

BORROWING – POLICY

- ILL code 4.12 "The due date is defined as the date by which the material is due to be checked in at the requesting library for return to the supplying library."
- ILL CircMap Policy (https://wyld.sirsi.net/map/)
- Who is eligible
- What will you borrow (borrowing vs. lending)
- Are there limits
- Charges

BORROWING – POLICY

- How do patrons request materials
  - Enterprise/OPAC
  - Worldcat
  - Library staff only
- Materials available at your library (missing, checked out…)
- Recover if overdue/lost

BORROWING – WHERE'S WALDO

- Worldcat
- GoWyld.net
- Union Catalogs
- Ask friends and neighbors

- Other possibilities:
  - Records & database citations are subject to error
  - Check spelling, transliteration, age, publisher, material type
  - Commercial suppliers (Proquest Dissertations)
  - Open access, public domain materials
  - Bibrecord – 500 and 700 fields

BORROWING – FOUND!

- Communication
  - Lender restrictions or special requests?
  - Complete Citation
  - Lender's shoes

- Unfilled requests
  - Reasons potential lenders decline
  - Check your MARC record (?)
  - Resume detective work

HANDLING RETURNABLES

Interlibrary Loan Code

- All loans are subject to recall

- All restrictions need to be followed

- Lenders may specify return shipping methods and additional instructions

- Do NOT put adhesive material (tape, labels) on borrowed items

- Item is due back at your library on the due date

- Borrowing library is responsible from start to finish

- Speak with lending library for lost materials

PATRON-DRIVEN ACQUISITIONS

- Heavily requested materials
- Hard to find items
- Work with Acquisitions/Collection Development to create a plan

LENDING - POLICY

- Questions to consider
  - Who/what/where will you lend
  - Charges
  - Loan period
  - Renewals
  - Recalls (or borrow)
  - Packaging and shipping

LENDING - COMMUNICATION

- Worldshare ILL account is up to date & accurate
- Contact information findable
- Check often
- Internal communication
  - Collection managers, special collections, circulation, etc.
  - Non-circulation items
    - Exceptions
    - How many times has it circulated in the past
    - Is it replaceable
    - ILL lending lost/damaged statistics
- If you can't fill
  - Give borrowing library reason why
  - Report errors to cataloging or electronic resource manager

LENDING – COMMUNICATION CONT.

- Max cost
- Date needed by
- Requested delivery method
- Special instructions
- Copyright for non-returnables
- Licensed to fill from electronic resources

LENDING - TIPS

- Don't…
  - Deal directly with another library's patron
  - Update to "shipped" unless the article is already mailed/scanned/copied/sent
  - Conditionalize a request when the only possible answer is No
  - Hold on to a request to check shelves again when you are early in the string
  - Staple packing envelopes shut
  - Fill a request if your charge exceeds the borrower's max cost
  - Invoice a library more than six months after the request

LENDING – TIPS CONT.

- Do…
  - Respond to requests promptly
  - Include a cover sheet that includes at least the ILL number and title of the request
  - Pay attention to special requests
  - Consider making exceptions when possible – why is that item non-circulating?
  - Respond to renewal requests in a timely manner, even if your answer is no
  - Respond to "not received" messages in a timely manner
  - Suspend services when closed or on vacation
  - Be generous

MORE RESOURCES

- Guidelines for Interlibrary Loan Operations Management - http://www.ala.org/rusa/sites/ala.org.rusa/files/content/stars-guidelines-for-ILL.pdf

- Guidelines for Resource Sharing Response to Natural and Man-Made Disasters - http://www.ala.org/rusa/sites/ala.org.rusa/files/content/resources/guidelines/GuidelinesDisasterPrepResponse2017.pdf

- IFLA Guidelines for Best Practice in Interlibrary Loan and Document Deliver - https://www.ifla.org/publications/guidelines-for-best-practice-in-interlibrary-loan-and-document-delivery?og=56

QUESTIONS?

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